

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(February 2001)**

Overview

The Program Management Services Achievement Report documents the Modernization Partner's ability to effectively provide Leadership and Direction Setting and to execute the processes and services as prescribed in the Modernization Program Plan.

The Leadership and Direction Setting function includes the following:

- Ensure across the enterprise the integration of the business functions, the application architecture required to support the business functions, the organization, and the Program direction
- Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan, revising as appropriate
- Revise Modernization Blueprint in accordance to the Target State Vision and Integrated Sequencing Plan
- Continue to develop relationships with strategic partners and product vendors to support Program initiatives and provide best in business solutions

In addition, the Modernization Partner leadership team is committed to helping SFA deliver to its milestones documented in the Modernization Blueprint Sequencing Plan, as documented below.

Outcomes Achieved:

The Modernization Partner leadership team has performed these functions as demonstrated below:

- ✓ Integration across the enterprise
 - Continued to use the draft Target State Vision diagram as the basis for communicating SFA's integration strategy to Modernization teams. Met with several teams to explain the Target State Vision diagram and help apply it to their efforts, including NSLDS Mad Dog team; the Portal Strategy team; several members of the CIO organization at the request of Wayne Wright; SFA individuals researching how to integrate school information for COD; and the SFA CIO team responsible for creating the web-based SFA "Roadmap" for Steve Hawald.
 - Call Center IPT shared their findings with COD Customer Service Team as they develop their plans for COD.

- Modernization Partner ITRs continued to work with the GMs to coordinate efforts across the Modernization Partner teams focused on each of the SFA PBO Victory List items.
- Revised the Bi-Weekly Scorecard to allow better focus on critical information. Created greater visibility of critical items (those receiving red and yellow ratings) while eliminating detail regarding the green-rated items.
- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan
 - Met with Greg Woods and Steve Hawald to continue refinements to the Target State Vision diagram. We are very close to a consensus on release of the 2002 Target as of the end of this month.
 - Delivered an updated Integrated Sequencing Plan as of November 17, 2000.
 - Continued to update and revise the Integrated Sequencing Plan in line with the current FY01 PBO Victory List Initiatives.
 - Initiated the process to develop the FY02 Modernization Investment Strategy by drafting an updated Integrated Sequencing Plan. Thus far, we have created a FY02/03 menu of potential projects which will help the DSG, IRB, and business units focus on next fiscal year project planning.
- ✓ Revise Modernization Blueprint
 - Continued to provide support to the Deputy CIO and delivered the final version of the Modernization Blueprint for Greg Woods review.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
 - Partnered with Public Strategies Group (PSG) to formulate a schedule for implementing team-based scorecards through SFA, inclusive of Operating Partners.
 - Established CDS Savings Calculation process to be used by SFA, legacy contractors, and Modernization Partner to quantify savings resulting from the CDS project.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - Developed working and contractual relationships with new SFA partner Total System, while leveraging past SFA successes with the inclusion of AFSA, EDS, NCS-Pearson and ACS, in order to ensure successful COD implementation.
 - Began work with KPMG in conjunction with SFA Operating Partners to support the eSign initiative.
 - Continued to develop relationships with CSC in the transition of new systems into a production environment (IFAP/Schools Portal) and with CSC and EDS in the operation of production applications (SFA Intranet and FMS Phase II).
 - Continued to work with NCS and KPMG in conjunction with TIVWAN planning activities.
 - Continued working with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects.
 - Finalized and gained concurrence (CIO, VDC, Mod Partner) on the maintenance functions each party will perform as part of overall IT Operations.
 - Coordinate monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
 - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:

- Selected Total System's TS2 software platform as a product base for COD. Total System and its product TS2 are recognized leaders in the banking industry.
- Continue to communicate Modernization Program initiatives with individual vendors – Viador, Autonomy and Interwoven - which will utilize their technologies.
- ✓ Overall Leadership and Direction Setting activities included:
 - Supported SFA efforts to work with review teams from the Education Inspector General and the GAO who are looking at SFA's Modernization Program.
 - Continued to chair the DSG and integrated the efforts of the Target State Vision, the Integrated Sequencing Plan, the Modernization Blueprint and program funding around agreed upon priorities.
 - Assisted the DSG and IRB by facilitating the refinement of Modernization business cases and their presentation to the IRB for funding allocation.
 - Assisted the SFA CFO develop an operational savings plan to achieve the COO's goal of a 19% reduction in unit costs by FY2004.
 - Continued to support SFA Transition Team planning

Key Milestones Delivered

Based on the Modernization Blueprint Sequencing Plan as of 8/31/00 (see Attachment A), the Modernization Partner has been effective in helping SFA achieve the milestones due for completion during the month of February 2001 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of February 2001.]

Nbr	X-Ref	Project	Milestone
M37*	V.B	Integrated Human Resource System	Initial draft of SFA Competency Model (original due date 12/31/00)

The milestones that were scheduled for completion during the months of September 2000 through January 2001, but were not completed are listed below with the revised completion date identified.

Nbr	X-Ref	Project	Milestone	Revised Date
M21	II.C.1c	e-Servicing	Requirements Defined (original due date 9/23/00)	April 2, 2001
M22	II.C.1c	e-Servicing	Complete Design (original due date 12/31/00)	April 2, 2001
M31	I.C	Web Portal	Application deployed to Production (original due date 9/30/00)	PRR successfully conducted on February 7, 2001. COO to roll out application on March 7, 2001.
M38		SFA University	SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00)	June and July 2001 (pending TO Mod)

Nbr	X-Ref	Project	Milestone	Revised Date
M54	I.B	Web Portal	School Portal Release 1.0 (original due date 9/30/00)	PRR successfully conducted on February 7, 2001. COO to roll out application on March 7, 2001.
M56	III.B	IFAP Replatforming	Replatforming Complete (original due date 9/30/00)	PRR successfully conducted on February 7, 2001. COO to roll out application on March 7, 2001.

ATTACHMENT A:
Modernization Blueprint Sequencing Plan
(as of 8/31/00)